

Organizational Self-Assessment on Justice and Equity

by *angela park*

	Not Started	Initial Steps	Deeper Work	Fully Engaged
Framing, Importance, and Integration				
GOALS & FRAMING	No mention of justice, equity, inclusion, diversity or impacted communities in organizational descriptions or documents. Organization has universal goals that apply the same to all.	General references are made to diversity, being welcoming, or DEI in organizational descriptions or documents. The organization states that the issues that are the focus of the mission impact some groups more than others.	Specific language on racial, economic, and social justice values and goals or inclusive and equitable practices are woven throughout internal documents and some public materials with a general rationale for why they matter. Diversity is not the sole focus and priorities for diversifying the org are clearly defined, no code words.	Explicit, specific language and clear definitions of the org's justice and equity values and goals are woven throughout internal documents and public organizational descriptions. Systemic, structural change and racial, economic, and social justice or other equity priorities are clearly conveyed and equity in programs is tied to the org's internal commitment to inclusive and equitable practices and culture.
RATIONALE & VALUES	Org frames its work as universally relevant to all without mention of disparate impacts. Does not describe a power analysis or understanding of structural inequality tied to the org's issues or mission.	Org mentions the benefits of diversity and the need to "reach out" to groups they describe as "marginalized" or "underserved" or "historically disenfranchised" but they don't clarify who those people and communities are.	The org specifically names the most impacted groups and an analysis of structural inequities and power that conveys why their leadership and engagement is so important to solving the issues on which the org works. The org's values are tied to the rationale for why this work is important to the org.	Rationale for why justice and equity matter uniquely to the org and its specific mission is understood and owned across staff, board, volunteers, donors, and partners. Org communicates sophisticated understanding and applies an analysis of structural racism, classism, sexism, and other forms of oppression to the specific issue focus of the org, its constituencies, and geographic scope. Includes commitment to ensuring those most affected are directly part of the organization and its work. Values and principles are clear and permeate the org.
STRATEGIC PLAN INTEGRATION	No mention of justice, equity, inclusion, or diversity in strategic documents.	General references are made to DEI, diversity, inclusion, or equity in the strategic plan, typically in a section about staff diversity or partnerships/outreach.	Specific language on racial, economic, and social justice values and goals or inclusive and equitable practices are woven throughout the strategic plan with a rationale for why they matter.	Explicit commitments and details on how racial, economic, and social justice values guide the strategic direction of the org are embedded throughout the strategic plan and other strategy documents. Clear expectations and success measures in strategy documents are relevant to all staff departments, board, and volunteers.
WORK PLAN GUIDANCE	No mention of justice, equity, inclusion, or diversity in organizational work plans.	HR mentions the need for recruitment to diversify staff, in general terms, in their work plan. The board talks about recruiting to diversify. Programs mention the need for outreach. Plans are not specific, nor is diversity defined.	Multiple departments have clarified the roles they must play for the org to achieve its goals. Multiple departments have specific projects planned to focus on specific goals that go beyond diversity. Leaders across the org own the work within their departments and engage their teams.	All entities/departments in the organization understand their role in driving organizational progress; have specific annual goals, actions, and measures for assessing their impact integrated throughout their work plan. Special projects drive some of the work but most of the focus is on embedding justice and equity values throughout all budgets, planning, and implementation. Managers support all staff to craft explicit equity-focused roles and work including annual goals.
Culture and Internal Operations				
UNDERSTANDING CULTURE	No one mentions organizational or workplace culture or organizational values.	Sporadic mention of organizational and workplace culture, usually in the context of general values of the organization or discussions about interpersonal behaviors.	Staff discuss and define the concept of organizational and workplace culture and have discussed what people experience, what needs to continue or be reinforced, what could improve or be addressed. Org values are articulated and mention appreciation for diversity, the desire to be welcoming. Board welcomes the staff work but does not discuss the board culture; some initial conversations with volunteers and partners.	Clear, shared articulation of the aspirational organizational and workplace culture -- closely tied to explicit organizational values -- across staff, board, volunteers based on robust discussion and feedback about facets of current culture. The aspirational culture is defined within the context of behaviors everyone is expected to practice and will be held accountable for.
ACCOUNTABILITY FOR INCLUSIVE BEHAVIORS	Inclusion is rarely mentioned; diversifying is the focus. General concepts are not tied to behaviors.	Terms are used to define the org's aspirations: inclusion, welcoming, belonging, teamwork. Recognition that people of color and others with subordinated group identities sometimes have or had negative experiences within the organization, mostly based on interpersonal behavior.	Personal responsibility, especially the leadership and behaviors of staff/board members, is openly discussed. Feedback and examples of behaviors to be avoided are shared. General language about making positive contributions to the culture is included in qualitative assessments within performance reviews. Org solicits input about organizational culture via staff surveys and other means. Board is kept abreast of staff work.	All staff and board members share a responsibility for consistently exhibiting specific behaviors that contribute to others and themselves experiencing the aspirational culture and positive impacts of the org's values. Leaders on the staff and board model these behaviors and manage and hold themselves and others accountable in performance reviews, project assessments, surveys, and other forms of feedback that are welcomed and built into practices. Direct communication skills are cultivated.

Culture and Internal Operations - continued				
	Not Started	Initial Steps	Deeper Work	Fully Engaged
EQUITY IN INTERNAL POLICIES	Policies and practices are considered universal, unrelated to equity or differential impacts based on people's group identities.	Organization's understanding of internal equity is mostly focused on equitable hiring and diversity of staff.	Organization has assessed its policies and practices for disparities in impact and has begun to make changes in a few areas. They could include recruitment, hiring, retention of staff/board/volunteers/partners, promotions, pay, and program participation.	Policies and practices are continuously planned and assessed by clarifying and discussing how they may or do impact people by group identity equitably or differently. Demographic impacts are assessed in recruitment, hiring, retention of staff/board/volunteers/partners, promotions, pay, program participation, how people experience the organization's culture, and other areas.
RETENTION AND SUPPORT FOR PEOPLE WITH SUBORDINATED GRP IDENTITIES	Organization does not track demographic data or retention rates.	Organization tracks demographics and/or retention, informally, and some staff discuss anecdotes and patterns.	Org tracks demographics of staff and board, consistently, and tracks tenure and retention, accordingly. Leaders and HR discuss patterns and ways to address disparities including work on organizational culture and inclusive behaviors. Organic opportunities are supported for people of color, women, LGBTQ staff, and other people in subordinated groups to convene either within the organization, in emerging networks or attending conferences.	Organization tracks demographics of staff and board, consistently, and tracks tenure and retention, accordingly. All staff discuss patterns and leaders are responsible for proactive ways to support staff with subordinated group identities to address disparities. For example, affinity groups are sponsored and supported by the organization for subordinated groups and for people with dominant group identities who want to increase their skills and competencies. People with dominant group identities are clear about their responsibilities for creating a more inclusive culture that retains people in subordinated groups.
Skills and Competencies				
COMPETENCIES AND ACCOUNTABILITY	No specific competencies or expectations related to knowledge and skills on justice, equity, inclusion, or interpersonal skills are noted in job descriptions.	General interpersonal skills are noted in job descriptions and performance reviews and 1-2 competencies or expectations related to justice, equity, inclusion, or diversity are mentioned.	Some employees in different departments/across different roles and at various levels, especially those in executive and management roles, are aware of the skills and competencies they are expected to cultivate and exhibit. Performance review processes include these topics for those people.	Specific skills and competencies related to justice, equity, and inclusion are embedded into all job descriptions and performance review processes. They include understanding of how these issues play out at all levels--individual level awareness, interactions across group identities, institutional policies/ practices/ culture, and structural understanding of how justice and equity play out in the sector and within the issues that are the focus of the organization's mission.
EDUCATION AND LEARNING	No professional development or learning opportunities are offered.	Professional development opportunities are offered and some touch on interpersonal behaviors and skills. Optional staff-led discussions or a "diversity training" or other off-the-shelf learning opportunities have been offered to staff, sporadically.	Periodic learning opportunities are offered on a range of justice, equity, inclusion, and interpersonal, communications, and management skills. A few may be mandatory; most are optional.	Ongoing learning opportunities are offered on topics that are tied to justice and equity competencies the org prioritizes and to specific expectations/needs of staff. There is explicit attention to deciding intentionally which learning sessions are mandatory, optional, or geared toward specific roles or levels. Managers follow up to ensure learning opportunities translate into day-to-day work and interactions. Participation in education and learning and increased skills and competencies are a focus of performance reviews.
Fair Hiring and Equitable Representation				
REPRESENTATION	Staff and board do not represent the constituency most impacted by the issues on which the organization works. Org and leadership are overwhelmingly white, male, upper middle class, and people with high levels of formal education.	Staff and board do not represent the constituency most impacted by the issues on which the organization works. Strong representation on gender but minimal diversity across race, class, education, and other important group identities.	Staff and board include a critical mass of people who represent the constituency most impacted by the issues on which the organization works. Leadership, in particular, on staff and on the board include people from subordinated groups.	Staff and board demographics and leadership include least 30% people who identify as black, indigenous, or people of color—including a strong cross-section among them--and a critical mass of people who represent key constituencies most impacted by the issues on which the organization works. This includes ensuring there is more than one person of each race at a minimum (avoid the experience and potential tokenism of being an "only"), and not lumping together all people of color. Gender parity on staff, board, and among leadership and attention to representation of other groups are deemed important by the organization.
HIRING AND RECRUITMENT	Informal hiring, no written policy or practices. Generic publicity of job announcements or word of mouth, especially among friends and family on jobs, volunteer opportunities, board openings, contractors, and vendors.	Hiring policy exists but no one knows what it is or follows it. Distribution and publicity of job announcements is haphazard and inconsistent across the organization. Volunteer opportunities, board openings, and contracting are still via close networks.	Hiring policy exists and is followed most of the time. Focus on emailing job announcements to specific kinds of "diverse" groups for recruitment but organization lacks proactive, robust recruitment for all positions. Some attention paid to demographics and recruitment of board, contractors, vendors, and volunteers	Consistently followed, explicit recruitment practices and hiring policy for all staff based on clear recruitment priorities and ongoing resources and focus on recruitment. Hiring managers are held accountable for adhering to hiring policies and conducting robust recruitment. Org has a strategy and provides resources for ongoing recruitment. Same consistency and clarity for recruitment and selection of board, contractors, vendors, and volunteers.

Integration into External Programs, Communications, and Development

	Not Started	Initial Steps	Deeper Work	Fully Engaged
PROGRAM INTEGRATION	Programs focus on universal goals and serving all individuals or organizations. "Everyone is affected by our issues. We serve everyone, equally."	Recognition that some outreach is needed to underserved constituencies to diversify engagement and who is involved in or served by programs.	Active attempts to address disparities in engagement in programs, including a focus on those who have/are most impacted by issues and who have been structurally disadvantaged. Organization leverages its power and influence to address structural inequities within its sector and issue focus (advocacy, policy, cross-org work) that go beyond their institutional efforts.	All programs are planned, executed, and assessed with justice and equity explicitly in mind. The outcomes of programs address and mitigate structural and systemic issues and advance justice and equity.
PARTNERSHIPS	Organization has partners and works in coalitions and collective processes that are demographically similar and driven by historically powerful institutions. Partnerships and engagement are considered universal: We serve everyone, equally.	A few examples of partnerships or involvement in coalitions with orgs led by communities of color, or others who represent constituencies who have been historically disenfranchised. Org asks those groups for help with engagement in existing programs. No or few resources are shared with them to enable them to participate.	Consistently partners with or participates in coalitions with community-based organizations, those most impacted, or colleagues and orgs that prioritize social, racial, and economic justice and where those constituencies are in leadership roles. Co-design and strong relationships are the foundation of those joint projects. Funding is provided for those groups to participate--expenses and honoraria for their time.	Organization contributes to making their field a leaderful movement via authentic, trusting collaboration with partners, and centers the needs and expertise of those with lived experience and closest knowledge of the issues/problems to co-lead on programs, policy, or political solutions. Participates in coalitions and shared ventures that are led by those most affected and by members of historically underrepresented groups. Resources, funding, access, and power are shared, and redistribution is a priority.
PARTNERSHIP PRINCIPLES	No partnership principles.	Organization participates in one or a few coalitions that care about diversity and does some work with community-based groups or organizations representing most impacted communities. Partnership principles may come up.	Organization has wide range of partners and participates in a wide range of coalitions with a rich mix of partners. Basic partnership principles have been developed by 1-2 programs within the organization or general references are made to the Jemez Principles or similar work	Organization has explicit partnership principles that specifically translate available examples of principles to make them unique to the mission and work. These principles are embodied throughout the organization, explicitly shaped and used with partners in an ongoing way, and tools (for example MOUs) are used consistently.
COMMUNICATIONS	External communication is universal, one size fits all, and the org's issues are framed and described in broad, universal to all, terms.	Broader framing of issues, including impacts on people and communities. "Diverse communities" are named and effectiveness in communicating effectively across multiple constituencies is flagged but little or no tracking of the org's messengers or relevance of the org's messaging to these groups.	Organization avoids ill-defined terms such as "diverse" and "minority populations" and "marginalized groups" and uses more clear, specific language about impacted communities in consultation with them in describing the organization's issues and work. Recognition that framing and resonance and relevance can differ, and communications needs to be tailored and adaptive. There are a few examples of constituency-specific media outlets and language translations.	Framing of the org's issues includes justice, equity, structural inequality, and disproportionate impacts. The ability to communicate effectively with a wide array of constituencies is a core competency. Intentional efforts to broaden who communicates on behalf of the organization and to engage specific constituencies with attention to respectful engagement that isn't tokenizing. Media channels and language translation are intentionally chosen with specific constituencies in mind. Language translation is well resourced with resonant cultural framing rather than mere word translation.
DEVELOPMENT	Development focuses exclusively on raising as much money as possible.	Awareness of the overwhelmingly white, wealthy, often male demographics of funders and donors but belief that this is inevitable. "We don't know any wealthy people of color, so what can we do?" A few people of color and partners from community groups are invited to the annual dinner or other marquis fundraising events.	Organization acknowledges that major donors and foundations, their interests, and degree to which they have wealthy, white, male group identities often shape the organization's priorities, values. Organization discusses how current prospecting, modeling of donors/activists against wealth screens, and current networks of large donors need to shift; the investment needed; and short-term income trade-offs. Gift acceptance and funding parameters are discussed, including how potential gifts might compromise justice and equity values of the organization. Demographics are tracked; efforts, progress made to diversify staff/board members who raise money, donors, and event speakers and participants.	Major donor prospecting is broader and innovative. Donors include a critical mass of women and people of color and the organization has invested in effectively engaging many white donors about the importance of justice and equity. Organization leaders and development staff openly discuss the racial wealth gap and structural inequities that have resulted in dominant demographics and dynamics of fundraising, especially in org's field. Organization engages donors, foundations on the organization's commitment to inclusive behaviors, recognizing the constraints of funder accountability. Gift acceptance and fundraising policies include that the organization's justice and equity values cannot be compromised by donations and funder demands. Event speakers and participants reflect gender parity and a critical mass of people of color. Development staff and other staff/board members who raise money, and event speakers and participants include a critical mass of people of color. Recognition that some funds raised need to go to partners.

Assessing and Sharing Progress and Learning				
	Not Started	Initial Steps	Deeper Work	Fully Engaged
SUCCESS MEASURES	No explicit ways to assess progress on justice, equity, or inclusion related efforts, or diversity in the organization.	Organization has discussed how to assess progress for some equity-related goals. Organization tracks demographics as a measure of “diversity”—usually race and gender of the staff.	Organization has a long-term vision for equity and justice goals. Leaders, with staff input, have discussed how to assess progress for each equity-related goal. Staff surveys collect data on employee experience. Demographic are tracked at least annually of race and gender and other selected key group identities of staff, of staff leadership, of staff in each department, of board, and of board leadership.	All staff and board members are updated, understand, and convey how the organization assesses progress on justice and equity. All equity-related work is tied to specific success measures and specific staff or board members or groups are assigned to track progress within an organization-wide process. Program-related equity outcomes are assessed. Organization commits time and creates structures for assessing and communicating progress to all staff and board. Staff and board surveys are conducted and data tracked over time to influence new goals, make improvements to work underway, and flag concerns. These surveys assess people’s experiences across group identities in addition to demographics of race and gender and other selected key group identities of staff, of staff leadership, of staff in each department, of board, and of board leadership.
SHARING LESSONS LEARNED	Organization does not share any details of justice and equity work outside the organization.	Organization submits demographic data annually to GuideStar and key funders.	Organization works informally w/staff of other orgs and coalitions to share updates and learning. Organization communicates about justice and equity-related efforts via public reports, blog, social media, and web site. Organization submits demographic data annually to GuideStar and key funders.	Organization actively participates in and funds opportunities for learning about org-level efforts to embed justice and equity, across the field. Organization shares information, tools, and lessons learned on justice and equity-related efforts and works to move dialogue, learning, and progress across the field. Shares demographic data to GuideStar and key funders but is also explicit about representation being necessary but insufficient because truly embedding justice and equity requires more than diversity.